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SUPERMARKET BUSINESS

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PART ONE
OF TWO PARTS

VOLUME 40/NUMBER 12
DECEMBER 1985

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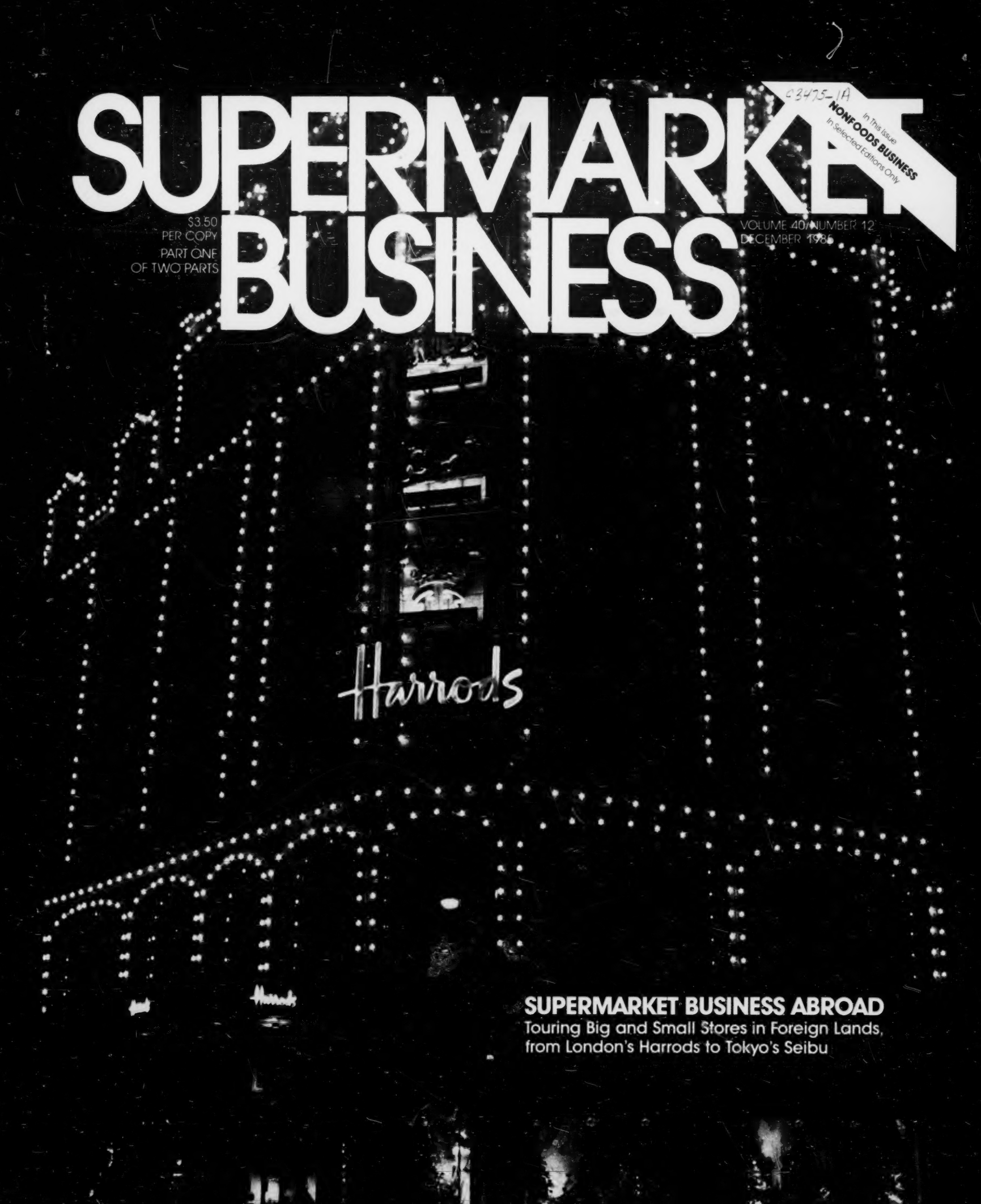
NONFOODS BUSINESS
In Selected Editions Only



SUPERMARKET BUSINESS ABROAD

Touring Big and Small Stores in Foreign Lands, from London's Harrods to Tokyo's Seibu

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SUPERMARKET BUSINESS

VOLUME 40
NUMBER 12
PART ONE
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DECEMBER 1985

SUPERMARKET BUSINESS ABROAD: RETAILING WITH A FOREIGN ACCENT 25
/KEN PARTCH, EDITOR

SUPERMARKET BUSINESS takes a camera tour of supermarkets in and around London, Amsterdam and Japan. In Britain, as in much of Europe, space is at a premium. But the British are beginning to come up with enormous stores that sell vast quantities of food and nonfoods. The Dutch, with less space, emphasize service and freshness. Shopping on the whole is on a much smaller scale than in the United States, but European stores can still provide American retailers with some merchandising tips.

JAPAN: WHERE SPACE IS PRECIOUS, SAVVY TRIUMPHS OVER SIZE 30
/MIKE O'CONNOR

A country the size of Japan cannot afford to have enormous supermarkets. But it does terrific volume with some sophisticated, stylish and superbly well-run supermarkets.

CIGARETTES: MANUFACTURER SEND CHANGING SMOKE SIGNALS 39
/PETER LEVITEN

Tobacco companies have been buffetted by consumption declines, and by what they see as lax merchandising techniques by supermarket operators. They are now aggressively courting smaller groups for new market shares.

NONFOODS BUSINESS* FACING PAGE 44
IN BRITAIN, FOOD MEETS NONFOODS

They don't mind buying desserts and dresses at the same store in Britain. Foods and nonfoods are given equal weight.

AT FOODMASTER, 'STRATEGIC PLACEMENT' MOVES NONFOODS
/KEVIN COUPE

Seeking a greater share of market, this Massachusetts store increased nonfoods space by 400 percent.

ALSO IN NONFOODS BUSINESS:
SAMI UPDATE
NEW PRODUCTS

*In selected editions only.

INSTORE BUSINESS: OUTSTANDING DELI & BAKERY EFFORTS 49

Here, we look at some of the best designs and promotions we've come across.

CHECKOUT: AT KAUFELT'S, THE SALAD BAR GOES CHIC 64
/BOB HUGHES

What's oak and brass and shopped all over? The brand-new salad bar at Kaufelt's, an upscale store that recently opened in New Jersey.

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TRADESCAN

Mergers And Acquisitions Reach An All-Time High This Year

FAIR LAWN, N.J.—A record number of food industry-related mergers and acquisitions took place during the first nine months of 1985, and there is no reason to believe that pace will diminish in the next year, according to The Food Institute.

"The ongoing restructuring of the food industry is picking up steam, with no signs of slowing down," said Frank Panyko, Food Institute vice president, speaking at the Produce Marketing Association's annual convention in San Francisco in late October.

Those words were well chosen, since a few weeks after his speech, on Nov. 14, The Beatrice Companies set a record for a non-oil-company takeover price, agreeing to be purchased by the management buyout firm of Kohlberg, Kravis, Roberts & Company for $6.2 billion.

Almost 500 transactions

Panyko noted that there were nearly 500 transactions, the highest figure ever for the first three fiscal quarters since the institute began compiling statistics in the early '70s.

"While we still have to see what the final quarter of the year will bring, 1986 clearly will go down as an important year for mergers in the nation's largest industry—including the recent acquisition of General Foods by Phillip Morris, creating the largest non-oil-related takeover ever until the Beatrice deal, valued at almost $5 billion."

Several areas had intensive activities during the nine-month period, according to the institute. Diversified food processors, with 73 mergers/acquisitions, were down from 80 for the previous period.

There were 42 mergers/acquisitions for restaurant and foodservice companies, compared with 49 for all of 1984 and 43 in 1983; 17 transactions for convenience stores in this year's first three quarters, more than last year's total of 12; and consolidation among grocery wholesalers, 29 mergers/acquisitions, compared with 36 for all of last year and 27 in 1983.

The right combinations

Commenting on the consequences of all these restructured companies, Panyko observed, "The combinations that work will make for stronger competitors in various industry areas. Along with the R.J. Reynolds/Nabisco and the Phillip Morris/General Foods combinations, other moves, smaller by comparison, are restructuring the food industry in a variety of ways.

"In the food processing area, we've seen Pillsbury move aggressively deeper into the restaurant business with the acquisition of Diversifoods, the largest franchisee of Burger King restaurants (Pillsbury owns Burger King), and the operator and franchisor of Godfather's, a leading pizza chain.

"Aside from that major move, Pillsbury also acquired Quik Wok, a small chain of Chinese fast food outlets, as well as a number of smaller Burger King franchises. Not overlooking other areas, the company also acquired the frozen potato division of R.T. French. Sticking close to their original business, Pillsbury also this year acquired a California-based producer of wheat flour and baking mixes."

Sara Lee is busy

Panyko noted that Sara Lee, formerly known as Consolidated Foods, was busy divesting, selling operations that included Idaho Frozen Foods, foodservice operations mainly in California, Nevada and Texas, its Sav-A-Stop merchandise division, parts of Booth Fisheries, and the 700-unit Lawson convenience store chain. The company's purchases included Ralston-Purina's foodservice division.

Beatrice, prior to its takeover, maintained an active transaction pace, divesting not only some of its non-foods businesses, but also its Shedd's Spread division, bakery operations, cookie businesses and cryogenic container operation.

Panyko added that Beatrice was pushing its meat operations, with Butterball turkey moving into pre-cut deli items.

More to come

"Beatrice is apparently taking the leveraged buyout route, thus making for an almost Byzantine transition, stemming from the Esmark takeover of Norton Simon, to Beatrice's acquisition of Esmark."

"The development of each of those diversified firms makes an interesting story," Panyko said. "While analysts thought the final chapter would be written as Beatrice divested itself of over $1 billion worth of operations, it looks as if the tale is not yet fully told."

Panyko observed that the flurry of divestments, acquisitions and mergers was an effort by manufacturers to maintain or boost market share in an increasingly competitive business environment.

FOOD BUSINESS MERGERS & ACQUISITIONS
First Nine Months—1985
(Food Institute analysis)

Category:	Total No. of Acq.	No. of Ind. Purchasers	Acq. of Sim. Businesses	Acq. of Firms Outside Food Industry
Agricultural Cooperatives	10 (6)	10 (6)	10 (6)	—0—
Bakers	12 (8)	10 (7)	11 (8)	1
Brewers	4 (1)	3 (1)	4 (1)	—0—
Brokers	18 (8)	16 (6)	18 (8)	—0—
Confectioners	2 (0)	2 (0)	2 (0)	—0—
Dairy Processors	13 (12)	9 (8)	13 (10)	—0—
Diversified Firms with Interests in the Food Industry	23 (31)	18 (20)	—	9
Food Processing Firms	73 (50)	38 (50)	65 (70)	7
Foodservice Vendors	15 (12)	8 (4)	12 (12)	2
Hotel & Lodging Companies	8 (3)	5 (3)	8 (3)	—0—
Meat Packers	4 (5)	3 (4)	4 (4)	—0—
Nonfood Package Selling Through Supermarkets	4 (2)	4 (1)	4 (1)	4
Packaging Suppliers	19 (25)	13 (15)	19 (11)	—
Poultry Processors	6 (10)	6 (8)	6 (10)	—0—
Primary Products Companies	8 (11)	8 (11)	8 (11)	—0—
Restaurants & Foodservice Concerns	43 (35)	27 (32)	42 (35)	—0—
Retailers				
Convenience	17 (10)	15 (8)	14 (10)	3
Supermarkets	14 (21)	12 (12)	11 (19)	3
Other	6 (7)	6 (6)	—	—
Seafood Processors	2 (2)	2 (2)	2 (2)	—0—
Snack Food Processors	7 (0)	7 (0)	7 (0)	—0—
Soft Drink Bottlers	11 (10)	4 (6)	8 (8)	1
Sugar Refiners	2 (1)	2 (1)	2 (1)	—0—
Suppliers To the Food Industry	17 (18)	16 (18)	15 (18)	—
Unclassified & Private Individuals	91 (109)	91 (107)	—	34
Wholesalers	29 (31)	24 (28)	28 (19)	1
Foreign Firms Buying U.S. Firms; Canadian Firms	5 (5)	4 (4)	5 (5)	—0—
Other Foreign	36 (21)	29 (17)	—	7
TOTAL	498 (484)	392 (385)	318 (254)	46

NOTE: Numbers in parentheses indicate number of transactions through the first nine months of 1984.

First-time Entry in SB Contest Wins VCR

NEW YORK—It was a classic misunderstanding that resulted in an abruptly terminated phone conversation. But Patrick Murphy was finally reached and told the good news: he won a VCR as October's winner in the SUPERMARKET BUSINESS contest, "How Well Do You Know the Supermarket Business?"

Murphy is the manager of Miller's Food City in Spirit Lake, Idaho, a town of about 1,000. An early call to the 6,000-square-foot "super convenience store" was fielded by an employee who mistook the caller for a salesman. And when he heard that the prize was a VCR, he replied, "That's always a nice thing," and promptly hung up.

"That was Mark, one of the owner's (Joe Miller) two sons," Murphy later explained. "You see, we're always getting calls from salesmen, and he works in the meat department and has these guys call up all the time and say stuff like, 'Congratulations, you've won a free set of knives,' or something like that. Since we're so busy here, we don't have the time to do business over the phone, and we're kind of suspicious about these calls.

"But when I found out that it was a call from New York, I thought, 'Uh-oh, what was that?' A VCR? Hot dog, you guys are all right!"

The first time proved to be the charm for Murphy. He has filled out the contest questionnaire in the past but had never sent it in before the October issue. Noticing that employees from area stores were listed among the correct entries provided the impetus.

"I read the whole magazine first, then after I'm done reading it, I go back and try to do the questions. I can usually get them all except for the ads, which i have to check back. It's fun just to look through the list of correct answers to see if there's anyone in there from this area."

Miller's is a member of the U.R.M. Stores, Inc. cooperative, based in Spokane, Wash. According to Murphy, the store, despite its small size, likes to offer a little bit of everything, including a service meat department with a smokehouse, "competitive prices on groceries," and gas pumps. Spirit Lake, he said, turns into a "mini-California" in the winter, with vacationers from nearby states taking advantage of the beautiful mountainous terrain and ski slopes.

Murphy also extended us an invitation to come out and see his "beautiful town and store" someday. We may take you up on that, Pat, but we'll let you know by telegram.

This month's contest can be found on page 62, and the list of correct entries for October begins on page 46. And don't forget, Murphy and all other SUPERMARKET BUSINESS contest winners, as well as readers, are eligible for our special contest, which will appear in next month's issue.

SAMI UPDATE:

HBA Sales Continue To Rise, Although at a Slower Rate

BY ALAN MILLER, JR.

Although the sales gains in HBA products are slowing a bit, the whole department is experiencing quite good sales this year.

During the four weeks ending Oct. 11, 1985, food store unit sales of health and beauty aids continued upward, but the 1.8 percent growth rate trailed the increases of 5.4 percent and 2.9 percent during the two preceding 28-day reporting periods.

The increase amounted to more than 4.78 million units, and the gain rate was higher than the 1.6 percent increase recorded in the dry grocery:nonfood department, and 1.7 percent for shelf stable foods. This represented a far stronger performance that that seen in the frozen food section, where a loss of 2.1 percent in unit sales was registered. Once again, the highest rate of growth in food store product departments was among refrigerated foods, where four-week unit volume rose 4.4 percent.

While each of the eight product groups measured by SAMI had unit sales gains in the two preceding periods, this time, two had minor declines. First aid products had a loss of 0.1 percent and proprietary remedies had a drop of 0.3 percent. The highest rates of gain at the product group level were 5.1 percent for hair care needs, and 4.9 percent for personal deodorants.

Although more product categories had gains than losses—27 gains versus 23 losses—the preponderance of gains was less than the 34 to 16 ratio seen in the period ending in mid September. The most significant change between the periods was found in the hand and body cream and lotion category, where a gain of 4.1 percent has turned into a loss of 12 percent, as this category is being compared against a corresponding period a year ago, in which the October gain had been 8.3 percent compared with the 1983 period.

In the baby needs product group, three out of four categories were successful in achieving increased sales. The only decline was an 11.9 percent loss for infant clothes, which is running consistently behind year-earlier levels. Since this is the baby needs category with lowest sales, however, the loss was not sufficient to cause a negative trend in the product group as a whole, and a 2.8 percent gain was achieved. Baby powder sales grew 7.2 percent, the best performance for these products in many months.

Sticks still reign

The scenario in the deodorant product group has not changed markedly from the trends observed in recent months. Stick deodorants are continuing to solidify their hold in first place among all deodorant and antiperspirant types. The most recent gain of 20.9 percent parallels the 12-week rate of increase, and is higher than the 12.8 percent gain on an annual basis.

These stick brands are pulling sales away from roll-ons, creams and sprays, and in the latter case, a weakness here of 5.1 percent is also attributable to the fact that body deodorant sprays have not been able to maintain their initial sales momentum. In the current period, volume of feminine hygiene deodorants was back in the minus column, with a 2.1 percent loss, but because of their relatively small volume base, this decline lacks importance.

The sales level of deodorant and talcum powders has continued up, as a result of volume contributed by new line extensions of Shower to Shower in particular. Also enjoying a double-digit rate of gain for the fourth month in a row were foot deodorants and athlete's foot remedies, this time showing a gain of 14.1 percent.

First aid antiseptics enjoyed a gain of 4.7 percent, but this increased volume was offset by a loss of 1.3 percent in the higher-volume first aid products category. The net loss was only 10,000 units, however, or a dip of 0.1 percent for both categories combined.

Hair loss

Three hair care needs had lower volume than in the reporting period a year ago, but in the case of shampoos (− 0.1 percent) and hair conditioning rinses (− 2.7 percent), the loss rates were lower than those registered in the previous period (− 7.2 percent and 6.8 percent, respectively). But after recording a gain in the previous period, home permanent kits moved downward 3.2 percent.

The rate of gain for hair setting needs, where the hair styling mousse products have been flourishing, has been declining, as these products move toward a period of maturity. In the four-week period, their movement was forward to the tune of 85.2 percent, just below the 85.8 percent gain recorded in the September period.

Hair spray sales registered another important gain, continuing a consistent trend of double-digit increases. There were gains in excess of 5 percent for both hair coloring products (+ 6.3 percent) and hair dressing needs (+ 7.2 percent). In all, the four-week gains for all hair

care needs combined totaled 2.3 million units, a gain of 5.1 percent over the period a year ago, which was ahead of the 1983 level by 12.1 percent—thus a strong gain on top of strength for these items.

The 1.2 percent gain rate for oral hygiene items was hurt by declines of 8.6 percent, 6.8 percent and 6.0 percent for mouth washes, denture adhesives and denture cleaners, respectively. As a result of new product line extension activity in the toothpaste and powder segment, particularly involving dentrifice pumps, this category was able to show a four-week gain of 1.4 million units representing an increase of 4.6 percent. For the third period in a row, the sales gain for toothbrushes was just over the 2 percent level.

Proprietary remedies

SAMI tracks 14 proprietary remedy categories, although the sales of natural vitamins, mineral and supplements are not included, since a full year of data are not available in this new category. Of the remaining 13 categories, seven had unit volume increases and six had losses.

From a percentage standpoint, the 24.0 percent loss for proprietary tranquilizers is the most dramatic drop, but it must be kept in mind that these products contributed only 18,000 items during the 28-day period. Of greater significance are the losses of 3.4 percent for internal analgesics, where two of the three new major brands (Advil, Nuprin and Encaprin) are experiencing weakness; cough remedies, down 4.5 percent, and nasal sprays-drops-inhalers off 7.0 percent.

Among the cold remedies, cold tablets (+ 5.5 percent) continued to exhibit upward progress, and it should be kept in mind that recent strength in this category has been achieved against a strong base period a year ago, during the mid- and late summer months.

Laxative sales

Antacids have been recording gains ranging between 3 and 4 percent during the past four sales periods. Laxative sales rose 3.6 percent and both synthetic vitamins and sleeping aids were just barely in the plus column. As has been customary for months, the best sales performance in this product group is shown by eye care products, particularly items for contact lens wearers. Sales of appetite suppressants are weak, and it must be surmised that some consumers are shifting their allegiance to other types of diet products found in food departments.

In the preceding period, all five shaving needs categories had plus signs, but in the most recent interval, loss rates were found in the two categories with low volume bases: a decline of 1.7 percent for pre-shave lotions, and 2.9 percent for razor sets.

Shaving cream sales were close to par against a year ago (+ 0.4 percent), while relatively strong growth trends were found among after shave lotions (+ 9.3 percent) and razor blades (+ 4.0 percent)—thanks to volume from Gillette's Atra Plus and the continuing sales vitality for disposables.

The rapid expansion in the skin care aids product group reversed direction, and in all five categories combined, the growth was less than 1 percent (+ 0.6 percent) in contrast with a series of double-digit gain rates in recent months. As noted earlier, the most significant change in trend was the 12.0 percent loss encountered by hand and body creams and lotions, which were up against an increase of 8.3 percent, in the corresponding period a year ago, versus October 1983.

To a large extent, as the result of sales contributed by Buf Puf, volume for facial preparations soared 31.8 percent, but this advance was less than the gains exceeding 40 percent seen in the two preceding periods.

Lip care

Another category with a trend reversal was lip care products, where a modest decline of 0.7 percent was in sharp contrast with gains ranging from 23 to 31 percent in the three prior 28-day periods. A loss of 2.7 percent for suntan lotion-suntan oil is not important after summer has ended. Movement of cosmetic and medicated skin aids was ahead 1.8 percent, also a lower gain rate than had been observed during the summer.

As 1985 draws to a close, there is little time remaining for new HBA product introductions to provide important sales impetus, since few companies choose to launch their new offerings during the year-end holiday season. But based on performance to date, it would appear that health and beauty aids will end up the year with the highest rate of increase in dollar sales, among items that SAMI tracks. During the year ending Oct. 11, the gain stood at 7.5 percent, in comparison with 4.6 percent for all departments combined.

HEALTH & BEAUTY AIDS: SAMI FOUR-WEEK FOOD STORE UNIT TRENDS VS. YEAR AGO

	% CHANGE VS. YEAR AGO		
PRODUCT GROUP AND CATEGORY	4 WEEKS ENDING 8/18/85	4 WEEKS ENDING 9/15/85	4 WEEKS ENDING 10/11/85
BABY NEEDS	**+ 4.4%**	**+ 2.1%**	**+ 2.8%**
Baby Powders	+ 5.3	+ 5.5	+ 7.2
Baby Oils, Creams & Lotions	+ 4.5	– 0.1	+ 2.6
Infant Clothes	– 5.9	– 9.4	–11.9
Nursing Supplies	+ 6.6	+ 5.3	+ 5.2
DEODORANTS	**+ 2.0%**	**+ 6.2%**	**+ 4.9%**
Sprays	– 5.5	– 2.6	– 5.1
Roll-Ons	–14.7	– 6.9	– 3.2
Stick Deodorants & Pads	+18.3	+22.9	+20.9
Creams	– 7.9	– 7.6	– 9.5
Deodorants & Talcum Powders	+29.2	+22.4	+17.7
Feminine Hygiene Deodorants	+ 7.5	+ 0.3	– 2.1
Foot Deodorants & Athlete's Foot Remedies	+18.3	+18.5	+14.1
Feminine Douches	+10.8	+ 7.0	+ 4.9
FIRST AID	**+ 2.7%**	**+ 2.8%**	**– 0.1%**
Antiseptics	– 3.3	+ 5.4	+ 4.7
First Aid Products	+ 4.7	+ 1.2	– 1.3
HAIR CARE NEEDS	**+ 7.1%**	**+ 0.6%**	**+5.1%**
Shampoos	– 1.2	– 7.2	– 0.1
Hair Sprays	+13.5	+12.3	+12.4
Hair Conditioning Rinses	+ 5.4	– 6.8	– 2.7
Hair Setting Needs	+112.4	+85.8	+85.2
Home Permanent Kits	– 7.9	+ 5.0	– 3.2
Hair Coloring	+10.5	+12.9	+ 6.3
Hair Dressing Needs	+12.6	+10.8	+ 7.2
ORAL HYGIENE	**+10.5%**	**+ 3.5%**	**+ 1.2%**
Toothpastes & Powders	+16.9	+ 5.7	+ 4.6
Mouthwashes	– 0.8	– 1.0	– 8.6
Breath Fresheners	+ 5.2	+ 5.0	+ 1.0
Denture Cleaners	+ 4.6	– 0.6	– 6.0
Denture Adhesives	– 5.4	– 5.8	– 6.8
Toothbrushes	+ 2.2	+ 2.3	+ 2.2
PROPRIETARY REMEDIES	**+ 1.5%**	**+ 1.6%**	**– 0.5%**
Antacids	+ 3.9	+ 3.7	+ 3.5
Internal Analgesics	– 8.9	– 5.9	– 3.4
External Analgesics	+ 4.8	+ 3.6	– 2.5
Cold Tablets	+10.6	+ 6.6	+ 5.5
Nasal Sprays—Drops—Inhalers	– 0.6	– 4.4	– 7.0
Chest Rubs	– 1.2	+ 4.2	+ 0.3
Cough Remedies	+ 6.0	+ 0.3	– 4.5
Laxatives	+ 3.1	+ 3.5	+ 3.6
Sleeping Aids	+12.4	+ 5.0	+ 1.4
Tranquilizers	–18.4	–19.9	–24.0
Synthetic Vitamins (Natural Vitamins, Minerals, Supplements)	– 0.1	– 2.3	—
Eye Care Products	+25.8	+29.0	+23.3
Appetite Suppressants	– 6.6	– 9.6	– 7.2
SHAVING NEEDS	**+ 1.4%**	**+ 2.8%**	**+ 3.2%**
Shaving Creams	+ 6.4	+ 4.6	+ 0.4
Pre-Shave Lotions	+ 5.5	+ 2.3	– 1.7
After-Shave Lotions	– 3.9	+ 8.6	+ 9.3
Razor Blades	– 0.8	+ 1.5	+ 4.0
Razors & Blades	+ 9.1	+ 2.7	– 2.9
SKIN CARE AIDS	**+19.0%**	**+13.3%**	**+ 0.6%**
Hand & Body Creams & Lotions	+16.2	+ 4.1	–12.0
Facial Preparations	+44.0	+43.2	+31.8
Lip Care Products	+31.4	+29.1	– 0.7
Suntan Lotions & Oils	– 3.9	–34.7	– 2.7
Cosmetic & Medicated Skin Aids	+ 8.1	+ 6.4	+ 1.8
TOTAL ALL CATEGORIES	**+ 5.4%**	**+ 2.9%**	**+ 2.8%**